Creating a Needs List in EMAT

Instructional Materials Division
Texas Education Agency
September 2017
• What is a needs list and why should I create one?
• How do I create a list for state-adopted instructional materials needs?
• How do I create a list for non-adopted instructional materials needs?
• How do I view needs lists in EMAT?
• What happens next?
Many districts and charter schools were affected by Hurricane Harvey. Those districts can now make submissions in EMAT to let others know what instructional materials they need. The resulting Needs List will be published in EMAT and on the TEA website to inform anyone wanting to donate materials to districts in need.

The purpose of this process is to connect those wanting to help with districts in need. Think of it as an instructional materials gift registry!
To start your needs list, click *Needs List Start Page* on your district’s start page.
That will take you to the Needs List Start Page.

Needs List Start Page

State-Adopted Needs List Transaction
Select the State-Adopted Needs List Transaction to start or add to your list of needs for state-adopted instructional materials that can be found in EMAT. This includes state-adopted packages or components of state-adopted packages. Instructions for creating a needs list can be found at [insert link].

Non-Adopted Needs List Transaction
Select Non-Adopted Needs List Transaction to create a list of needs for products not available in EMAT. These are items that districts would normally request funds for through an allotment disbursement request.

View Submitted Needs Transactions
Select View Submitted Needs Transactions to view your district’s needs list. This link will only appear if your district has submitted at least one needs list transaction. This link is also used to remove materials from your district’s needs list.

Fulfill a Need
Potential donors will select Fulfill a Need to view lists submitted by all districts in need. This link will be used to select the instructional materials you wish to provide for a district in need. After you select items on the Fulfill a Need link, an email will be generated to connect districts needing materials with those wanting to help and to inform TEA of the potential partnership. The fulfilling entity and the district in need will work together from there to hopefully fulfill the need. Instructions for fulfilling a need can be found at [insert link].
Select *State-Adopted Needs List Transaction* to start or add to your list of needs for state-adopted instructional materials.

Select *Non-Adopted Needs List Transaction* to create a list of needs for products not available in EMAT.

Select *View Submitted Needs Transactions* to view your district’s needs list. This link will only appear if your district has submitted at least one needs list transaction.

Select *Fulfill a Need* to view lists submitted by other districts.
District contact information will populate after the district has submitted its first needs list transaction.

This contact information will be sent to anyone wanting to fulfill a need for your district. This may include districts, private companies, charitable organizations, or private citizens.
Use the *State-Adopted Needs List Transaction* when adding items that can be purchased in EMAT. This includes entire state-adopted packages and single components of state-adopted packages.
To begin or add to your state-adopted needs list, select a qualifying condition from the drop-down menu.
Then follow the steps and read the information on this and the next several slides.

1. Select the grade level from the drop-down menu.
2. Click the magnifying glass to select the MLC.
3. Click the magnifying glass to select the ISBN.
4. Leave the *All Components* checkbox checked if you need all the components in the package.
5. The *Title/Description* field will populate based on the package ISBN selected.
6. Click the item details icon to view details of the package ISBN selected.

<table>
<thead>
<tr>
<th>Title / Description</th>
<th>All Components?</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>✓</td>
</tr>
</tbody>
</table>

Copyright © Texas Education Agency 2017. All rights reserved.
7. If you need only one component of a package, uncheck the *All Components* checkbox.
8. Click the magnifying glass to select the component.
9. The *Component Title* field will populate based on the component ISBN selected.
10. The *Publisher/Vendor* field will populate based on the ISBN selected.

11. The *Inventory Quantity* field will populate based on your district’s EMAT inventory. (Only materials purchased through a requisition will appear on your EMAT inventory.)
12. Enter the quantity needed.
13. The unit price will populate based on the material selected.
14. The extended amount will calculate the quantity times the unit price.
15. Click the (+) sign to add another row.
16. Click *Submit* prior to leaving a transaction session to have the materials published to your needs list.

You can add items to your submitted list at any time.

---

### State-Adopted Needs List

**School Year**: 2017-2018

<table>
<thead>
<tr>
<th>Report ID</th>
<th>Item Type</th>
<th>Type</th>
<th>Qualifying Condition</th>
</tr>
</thead>
<tbody>
<tr>
<td>R00</td>
<td>EMAT</td>
<td>State-Adopted Needs List</td>
<td></td>
</tr>
</tbody>
</table>

**Transaction Date-Time**

<table>
<thead>
<tr>
<th>Grade Level</th>
<th>MLC</th>
<th>Subject</th>
<th>ISBN</th>
<th>Title / Description</th>
<th>All Components?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Grade</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
17. Click *Return to Needs List Start Page* to return to the previous page.
Non-Adopted Needs List
Use the *Non-Adopted Needs List Transaction* when adding items that cannot be purchased in EMAT. These are items that districts would normally request funds for through an allotment disbursement request.

Similar to disbursement requests, this option will have free-type fields to provide information on the materials you need.
To begin, select a qualifying condition from the drop-down menu.
Then fill in the required information about the material you need.

- **Grade Level**—A range can be used for materials that cover multiple grade levels (e.g., K–5)
- **Multiple List Code (MLC)**—If the material is for a course that does not have an MLC, please leave this field blank.

![Grade Level and MLC fields](image-url)
• **Subject**—Enter a specific course name or subject area (e.g., Algebra I).
• **ISBN**—Enter the ISBN without hyphens. Use N/A if the material does not have an ISBN.
• Title/Description—Enter the specific title of the material needed.
• Publisher/Vendor—Enter the publisher or vendor name.
- **Quantity**—Enter the quantity needed.
- **Unit Price**—Enter the unit price.
- **Extended Amount**—The extended amount will populate based on the quantity and unit price entered.
Then follow the steps on this and the following slide:

1. Click the (+) sign to add another row.
2. **Click Submit prior to leaving a transaction session to have the materials published to your needs list.**

You can add items to your submitted list at any time.

---

**Non-Adopted Needs List**

<table>
<thead>
<tr>
<th>Report ID</th>
<th>Type</th>
<th>Non-Adopted Needs List</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROO</td>
<td>Qualifying</td>
<td></td>
</tr>
</tbody>
</table>

*Transaction Date/Time*

<table>
<thead>
<tr>
<th>Grade Level</th>
<th>MLC</th>
<th>Subject</th>
<th>Grade/Description</th>
<th>Publisher/Version</th>
<th>Quantity</th>
<th>Unit Price</th>
<th>Extended Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Click *Return to Needs List Start Page* to return to the previous page.
View Needs Lists
The *View Submitted Needs List* is used to view items on your district’s list. This link will only appear if your district has a submitted at least one needs list transaction.

This link is also used to remove materials from your district’s needs list.
Click *Download* to download your district’s list to an Excel spreadsheet.

<table>
<thead>
<tr>
<th>Component Description</th>
<th>Required Quantity</th>
<th>Price</th>
<th>Publisher / Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Studies Weekly</td>
<td>75</td>
<td>29.85</td>
<td>Studies Weekly, Inc.</td>
</tr>
<tr>
<td>Big Ideas Math Algebra 2 Texas Edition</td>
<td>23</td>
<td>82.00</td>
<td>Big Ideas Learning, LLC</td>
</tr>
</tbody>
</table>
Use the *Fulfill Status* field to remove an item from your needs list.

1. Select a reason from the drop-down menu next to the item that is no longer needed.
   
   Dropdown menu options:
   - Fulfilled
   - No longer needed

<table>
<thead>
<tr>
<th>Fulfill Status</th>
<th>School Year</th>
<th>Grade</th>
<th>MLC</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2017-2018</td>
<td>5th Grade</td>
<td>5320</td>
<td>Social Studies, Grade 5</td>
</tr>
<tr>
<td>2</td>
<td>2017-2018</td>
<td>High School - Math</td>
<td>8152</td>
<td>Algebra II</td>
</tr>
</tbody>
</table>
2. Click *Submit* and the item will be removed from the published needs list.
3. Click *Return* to go back to the previous page.
What’s Next?
Districts that want to fulfill a need can click on the *Fulfill a Need* link in EMAT.

Potential donors without EMAT access can contact the Instructional Materials Division (IMD) at *instructional.materials@tea.texas.gov*. IMD staff will enter the information in EMAT for those without access.
Clicking *Fulfill a Need* will generate an email to connect districts needing materials with those wanting to help and to inform TEA of the potential partnership. The fulfilling entity and the district in need will then work together to hopefully fulfill the need.
Once the need is fulfilled, please remove the material from your list using the *Fulfill Status* field on the *View Submitted Needs List* link.

IMD staff will adjust EMAT inventories for districts as needed for fulfilled state-adopted materials. Non-adopted materials are not part of district inventories in EMAT.